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ABSTRACT

The question of what determines the appropriate use of self-directed learning (SDL) as opposed to teacher-directed learning (TDL) for midcareer professionals was examined through a review of the literature on SDL, SDL in professional development, and through interviews with 12 midcareer adults in a wide variety of professions. In general, the professionals interviewed had a "lukewarm" attitude toward SDL. Many participants expressed equal satisfaction with SDL and TDL. When asked about particular SDL and TDL experiences, interviewees focused on the appropriateness of the method for the particular course. Where a clearly defined body of knowledge had to be mastered (for example, in accounting), the professionals clearly preferred a teacher-directed classroom. Special attention was paid to the comments of an individual responsible for training at a large federal government agency, who expressed the view that technical skills and conceptual skills are the employer's responsibility, whereas "people skills" should be learned by employees before they are hired. It was concluded that the appropriate use of TDL and SDL is determined by several factors and that adult educators must consider the following before designing TDL or SDL programs: the learner's psychological makeup, knowledge level, and experience; learner motivation; and course content. (MN)

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MID-CAREER ADULTS IN SELF-DIRECTED AND TEACHER-DIRECTED LEARNING

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ABSTRACT

The author's work with mid-career professionals reveals five factors to consider when designing self-directed or teacher-directed training and development. Course content must be considered in addition to the characteristics of the individual learner. Appropriate degrees of learner participation vary depending on the type of skill to be acquired--technical skills, people skills, or conceptual skills.

KEY WORDS

Mid-career, training and development, management development

OVERVIEW

The purpose of my research is to investigate the responses of mid-career professionals to self-directed and teacher-directed education. My interest in this topic is rooted in my own experience.

At the age of thirty-eight, after practicing as a CPA for sixteen years, I had a transformative learning experience in a self-directed M.A. program in Psychology. I was transformed from a goal-oriented learner (learning for career advancement) to a learning-oriented learner (learning for the sake of learning).

I immediately became a radical advocate of self-directed learning. But, like most radical ideas, it was impossible to apply the idea universally. Self-directed learning simply did not seem to work in some cases.

Before, and during, my self-directed M.A. experience, I taught a variety of business courses for a medium-sized college. I had taught Principles of Management, Organizational Behavior, Fundamentals of Investments, and Principles of Accounting for several years. For some classes I used self-directed learning (SDL) principles, but for other classes I clearly used a teacher-directed learning (TDL) format.

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Even after my transformative SDL program experience, I continued to use self-directed methods in some classes and teacher-directed methods in other classes. This caused a great deal of stress for me. Could I justify using both SDL and TDL teaching methods?

Because I cared about my adult students, I wanted them to experience the transformative power of self-directed learning. Yet, intuitively, a TDL class seemed appropriate for some courses. Surprisingly, at least to me, SDL and TDL methods were equally successful. What determines the appropriate use of self-directed, as opposed to teacher-directed, adult education?

REVIEW OF THE LITERATURE

For the sake of convenience, I will divide my review of the relevant literature into two areas: 1) SDL in general, and 2) SDL as it is applied in professional development. The first area provides the necessary background for understanding the work in the second area.

SDL in General

The literature on self-directed learning in general is quite extensive. For my purposes here, I am envisioning SDL as described by Knowles (1975). Knowles saw SDL as a joint effort between learner and teacher(s) where they eventually agreed to a learning contract.

Knowles (1975) emphasized the importance of developing techniques that would create environments conducive to maximizing self-directed learning (SDL). His following points bear repeating here: "Individuals who take the initiative in learning, learn more (p.14), and "Self-directed learning assumes that the human being grows in capacity and needs to be self-directing as an essential component in maturing" (p.20).

While I found Knowles' work to be lucid and inspiring, I had two reservations. Based on my own teaching experience, I realized, (1) some intelligent adults are not psychologically equipped to succeed at self-directed learning, and (2) some subject matters (i.e. accounting) are not appropriate for SDL. I had taught accounting for several years, and I had never met a learner who had succeeded in a "self-directed" or distance-

learning accounting course. These learners needed and welcomed teacher-direction with open arms.

The work of Huey B. Long addresses the psychological aspects of SDL. Long (1989) depicts the successful self-directed learner as having the following characteristics: 1) self-confidence, 2) self-awareness, 3) self-reflectiveness, 4) a strong goal orientation, and 5) an aptitude for systematic procedures. Obviously, all adult learners do not exhibit these characteristics.

In a book chapter entitled Challenges in the Study and Practice of Self-Directed Learning, Long (1991) advocates developing a theoretical framework for SDL based on an interactionist theory that provides for multiple variables. Long prefers to speak in terms of degrees of self-direction, rather than in an all-or-nothing approach (p.15).

In his 1991 chapter, Long presents an illustration of his model with pedagogical control on the horizontal axis and psychological control on the vertical axis (p.22). This illustration, divided into four quadrants, identifies situations where SDL is, and is not, appropriate based on the psychological make-up of the individual learner.

In a 1990 article in the International Journal of Lifelong Education, Long argued that psychological control is the necessary and sufficient cause for SDL. He pointed out that the over-zealous promotion of SDL resulted in a primary emphasis on techniques while neglecting the psychological variable.

For a thorough introduction to the theory and practice of SDL, I recommend Confessore and Confessore's (1992) work.

SDL in Professional Development

For my particular work with mid-career professionals, there is some outstanding literature on the use of SDL in professional development.

Foucher and Tremblay (1993) believe interest in SDL has been "sparked" by rapidly evolving technologies, increasingly decentralized decision-making, and larger spans of control. Staff members now need to identify their own training needs (p.229). Their study tried to determine, among other things, "To what extent do organizations value its (SDL) use, and how can they support its practice?" (p.230) These researchers

conducted a literature review and completed five group interviews with the representatives of 27 organizations (p.230).

Foucher and Tremblay (1993) depict learning in four quadrants (p.235):

1) participatory - planned with high autonomy (learning contracts)
2) guided - planned with low autonomy (computer-assisted)
3) autodidactic - unplanned with high autonomy (personal interest)
4) spontaneous - unplanned with low autonomy (pairing of employees)

Foucher and Tremblay (1993) reported two significant inhibiting factors for SDL in the workplace: 1) managerial control--an inherent function of management, and 2) trainers and HRD employees who fear job loss (p.241). Whereas, Long (1990, 1991) speaks of two variables--psychological and pedagogical, Foucher and Tremblay (1993) further divide the psychological variable into initiative and autonomy (p.238).

Kops (1993) believes with others (Marsick, 1988: Dailey, 1984) that organizations must adopt a broader concept of learning (p.247). The purpose of Kops' study was to examine managers' self-planned learning in an organizational context (p.248). His research methodology included an interview style that attempted to create dialogue (p.248).

Kops (1993) defined managers' self-planned learning as the learner in control of critical decisions regarding learning (p.249). His criteria included (1) the manager retaining control, and (2) the learning being outside of formal management training and development (T&D) program (p.249). Kops found SDL allowed for the satisfaction of learning needs outside of formal T&D. Formal T&D programs satisfied general learning needs (p.251). SDL had greater "utility" where learning needs were unique (p.252). The organization benefitted "in terms of a more well-rounded management team" (p.252). Managers saw "lack of time" as a "serious obstacle to self-planned learning" (p.254).

Kops (1993) emphasizes that the organization must make its corporate plans clear if it expects managers' self-planned learning to "fit" (p.254). Kops also points to professional contacts or networks as an important source of education (p.256). He found that SDL is enhanced or diminished by individual lifestyle, readiness to learn, and career phase

(p.256). According to Kops, "Organizations need to develop the capabilities of self-direction/development of mid-managers" (p.258). He suggests learning contracts be included in performance review (p.259). In conclusion, Kops said, SPL is "not a stand alone approach to management T&D. He recommends a balanced approach to management T&D (p.260).

Piskurich (1993) makes an important distinction between training and development. He believes training (technical skills) demands a more formalized approach; whereas, development lends itself more to SDL (pp.263-64).

Other researchers report that 80% of learning in corporate settings occurs informally, while 80% of training budgets are for formal training activities (see Carnevale, 1984; Lilliard & Tan, 1986; Sheppeck & Rhodes, 1988).

MY RESEARCH

My particular research involves interviewing mid-career adults in a wide variety of professions. A detailed description of my interview approach (phenomenological-heuristic) and my personal experience with mid-career education is discussed at length in an earlier work (Beitler, 1997).

I had the opportunity to interview a physician, an accountant, a business consultant, an organizational psychologist, a manager, a marketing specialist, a Federal government administrator, a computer engineer, a psychotherapist, an artist, a high-school dance teacher, and a training director.

Surprisingly, at least for me, was the participants' luke-warm response to self-directed learning. Because of my positive experience with SDL, I expected my research participants to be enthusiastic SDL advocates (many of them had SDL experience). In fact, the marketing specialist believed some of her best education was received through lectures at The Wharton School of the University of Pennsylvania.

The participants in my study seemed more concerned with the character of the teacher and the appropriateness of the teaching method. Many of the participants expressed equal satisfaction with SDL and TDL.

One participant listed the following characteristics of a good teacher:

being "human"
being patient
articulating clearly defined goals
willing to share what he or she thinks
providing constructive feedback
knowing when to give input and direction
knowing when to let the learner "flounder"
directing the learner to appropriate resources
helping the learner to "focus"

All the participants generally agreed with this depiction of the teacher as the caring-helper. The psychotherapist added, "patient with different learning styles" and "able to create an environment conducive to learning."

The organizational psychologist added the following:
an enthusiastic motivator
helps learners see other points of view
helps learners understand their own point of view
makes a distinction between fact and opinion

Other participants added:
enhances the development of the learner's self-confidence
sets high standards
has in-depth knowledge of subject and related subjects
demonstrates the importance of his or her subject
promotes critical thinking
wants to see students succeed

When asked about particular SDL and TDL experiences, the participants focused on the appropriateness of the method for the particular course. It was not simply a matter of their individual preferences. Where a clearly-defined body of knowledge had to be mastered (i.e. accounting), it was obvious the participants preferred a teacher-directed classroom.

When asked about the responsibility of corporations in providing training and development, I was struck by Laura's comments. Laura is responsible for training at a large Federal-government agency. She stated that technical skills (or training) and conceptual skills (the "big picture") are the responsibility of the employer. But, she believes people skills should have been learned by the employees before they were hired. While I believe people skills are at least partly the responsibility of the employer, I quickly saw the importance of Laura's delineation between technical skills,

people skills, and conceptual skills.

DISCUSSION

Laura's distinction between technical skills, people skills, and conceptual skills brought to mind the Principles of Management course I had been teaching. Some of the principles of management seem to apply to the field of adult education.

Adult education theorists have long spoken of adult educators as facilitators of a process. Perhaps these facilitators, or managers, of the educational process could learn something from managers of other processes.

Management students learn early in their studies that they must develop their technical skills, people skills, and conceptual skills. Adult educators likewise must develop teaching techniques, communication skills, and an ability to see the "big picture." Even more striking to me was the relevance of the Continuum of Leadership Styles, developed by several management theorists, including Tannenbaum and Schmidt (1973). The continuum contrasts boss-centered leadership on the left and subordinate-centered leadership on the right, with varying degrees of managerial direction and subordinate participation in between. See Figure 1.

Figure 1: The Continuum of Leadership Styles

Boss-Directed (autocratic) — Employee-Directed (laissez-faire)

In management theory, an autocratic, boss-directed leadership style is considered appropriate when the "boss" has considerably greater knowledge than his or her "immature" employees (immature in the sense of low degrees of knowledge and experience). Likewise, in a situation where the employees are mature, highly-motivated, knowledgeable, and capable of goal-setting, an employee-directed environment is appropriate.

The way in which these management theorists envision varying degrees of managerial direction and employee participation offers a great deal of insight into the teacher-learner relationship. There is no need to see teacher-direction and learner-direction as a dichotomy in which the choice of one must necessarily exclude the other. The degree of teacher direction or learner participation should be determined by the situation.

In management theory, a manager-directed workplace is considered appropriate with new, unskilled, or unwilling workers; an employee-directed workplace is considered appropriate where workers are experienced, highly-trained, and highly-motivated.

In adult education, a teacher-directed learning environment is appropriate with immature, uninitiated, or uninterested learners; learner-directed environments are appropriate where learners are mature, experienced in the field, and highly-motivated. Immature does not refer simply to chronological age. Immature carries with it the idea of being psychologically unequipped for self-direction (as discussed in Long, 1990). Uninitiated implies that the teacher's knowledge is dramatically greater than the learners' (as opposed to a collegial relationship). Uninterested includes learners who do not see the relevance of the subject matter.

Returning to the idea of technical skills, people skills, and conceptual skills, adults educators can again borrow from the management theorists. These skills, different in nature, are acquired differently. (A debate over whether these skills are innate or learned, while interesting, will be avoided here.) Few people doubt that these three types of skills can be enhanced.

But, we can't expect to enhance, or learn, these skills the same way. The technical skills of a CPA or heart surgeon are acquired through training. The people skills of the executive are acquired through the case studies of a management development program. The conceptual skills of the philosopher are acquired through the endless quest to understand the "big

picture."

When attempting to develop these three types of skills in adult learners, I am simply saying, "content matters." The following continuum (figure 2) depicts the three types of adult education with teacher-direction on the left, learner-direction on the right, and varying degrees of teacher-direction and learner-participation along the continuum.

Figure 2: The Continuum of Educational Needs

Teacher-Directed (Training)		Learner-Directed (Development)
Technical Skills	People Skills	Conceptual Skills
Courses	Courses	Courses
accounting	social sciences	critical thinking
surgery	group dynamics	strategic planning

Please note, I believe the extremes are ineffective and undesirable (100% teacher-direction or 100% learner-direction). Adult education needs to provide interaction with the teacher, fellow learners, and authorities in the field.

CONCLUSION

The appropriate use of teacher-directed (TDL) or self-directed learning (SDL) is determined by several factors. Adult educators must consider the following before designing a TDL or SDL program:

1) psychological make-up of the learner,
2) knowledge level of the learner,
3) experience of the learner,
4) learner motivation, and
5) course content.

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